



Mecklenburg County
Land Use & Environmental Services
Code Enforcement Department

Final Report to the Building-Development Commission

Data Customer Focus Group

March 20, 2001

Memo

Date: February 21, 2001
To: Tom Dooley, BDC chair
From: Jim Bartl, Director of Code Enforcement
Re: Data Customer Focus Group Final Report
CC: All DCFG members, Dick Pacetti, Kari Lanning

This memo shall serve as the final report of the Data Customer Focus Group (DCFG) to the Building-Development Commission (BDC).

In an effort to identify customer information needs, the DCFG met 12 times between September 20, 2000 and March 7, 2001. Overall, our customer base was well represented through the various meetings, even to the point of holding special small group meetings to assure all sides of the information need issue were taken into account (a summary attendance sheet is attached). Throughout these meetings several exercises were performed to identify what those needs are and how electronic information might best be presented to our customers.

The end result of this effort was the development of several mock up reports, which the customers agreed fairly represent both their information needs, and a simple clear method to communicate the information to them. Those reports are attached for your review.

The reports are divided into three components in the following order:

- A. Legacy System
- B. Plan Review
- C. Permitting/Inspection System

In addition, the customers had other concerns, not related to the reports, which they wish the LUES Design Team to address. Those concerns are as follows.

1. Need print buttons on all Internet screens, or anything you see.
2. Subcontractors need some easy, electronic way to verify if a General Contractor on a permit application is using their name.
3. Must be able to download data in text form so customer can reconfigure, as needed.
4. Want to see the inspector's comments.
5. Need an exception report on re-review (part of Commercial Process Initiatives).
6. The customer has a concern that failed inspections sometimes do not identify defect codes.
7. Customer still has to retrieve plans from the City in order to get their permit; the one-stop shop method is not fully effective.
8. There is still some confusion in the facilitation staff on two issues: ETJ and how many sets does the customer need?
9. Would like to see the website easier to navigate.
10. E-mail when the contractor's account number shows activity.
11. Links to the other State and Federal agencies impacting their projects.

The issue of integrated information on all jurisdictions is the most critical. The customers need a single source of access for all regulators, which can impact, plan approval, inspections, and/or certificates of occupancy. In one of the closing meetings, the DCFG received a presentation from NuTech Solutions on alternate approaches to developing integrated information systems. The DCFG thought this approach had merit, especially as applied to the problem of coordinating databases between the City, County and 6 Towns. The DCFG strongly encourages the BDC and the Code Enforcement Department to receive a similar presentation from NuTech, focusing on this topic, and identifying the related strategies, costs and time lines.

Finally, the customers believe this work should be implemented as expeditiously as possible

Attendance Summary

Name	Representing	09/20/00	10/04/00	10/18/00	11/01/00	11/15/00	11/29/00	12/20/00	01/03/01	01/10/01	01/24/01	02/07/01	02/21/01	03/07/01
Austin, Greg	BDC	X	X						X	X				
Aycock, Ben	BDC	X	X		X		X				X		X	
Bambrick, Brendan	Shelco, Inc.		X											
Batten-Balas, Karen	Wood Partners							X						
Bart, Jim	E&BS	X	X	X	X	X	X	X	X	X	X	X	X	X
Belk, Dean	Optima, PA	X	X				X			X				
Burkhard, Michael	E&BS	X	X	X		X			X			X		
Burnett, Alex	E&BS							X				X		
Case, Ray	Raymond R. Case	X	X	X	X		X				X	X	X	X
Caulder, Will	Rodgers Builders, Inc.	X	X											
Cox, Tom	County Commission												X	
Daignault, David	W. B. Moore	X							X	X			X	
Daurity, Bob	Ryland Homes	X	X	X										
Dooley, Tom	BDC												X	
Drennan, Rob	E&BS	X	X	X	X	X			X	X		X		X
Farris, Ray	Tuscan Development	X									X			
Garrison, Tim	R. T. Dooley Construction	X	X		X	X						X	X	
Geer, John	City Engineering												X	
Gordon, Charles	Edison Foard, Inc.													
Granelli, Chris	Mulvaney Properties													
Grdich, Jim	Slate Street Construction			X				X						
Hardman, Gina	Cummings Construction							X						
Hollenbach, Mark	Price Brothers				X	X				X	X	X		
Hodges, Charles	Cambridge Partners	X												
Honeycutt, Butch	E&BS	X												
Houle, Marc	Yarborough & Associates													
Huguley, Pierre	Pulte Homes								X					
Kortekaas, Roger	PS&I													X
Lanning, Kari	E&BS	X	X	X	X	X	X		X	X	X	X	X	X
Liebenritt, Steve	Pulte Homes								X					
Long, Jim	Frye Electric		X		X			X						
McCants, Linette	Saussy Burbank, Inc.				X	X			X					
McLaren, Lee	DPR Associates	X	X	X				X					X	
Mendenhall, Anna	CO IST				X									
Milner, Stuart	Milner Alrco													
Morrison, Emerson	CO IST				X			X						
Pacetti, Dick	E&BS	X			X		X		X				X	X
Parker, Phillip	Cummings Construction							X						
Payton, Michael	Carolina Place		X											
Price, Tamea	Price Brothers					X				X	X	X	X	
Rikard, Jeff	Wood Partners		X	X	X			X						
Rowell, Michael	McCulloch England													
Sanchez, Ted	ColeJenest & Stone	X	X	X	X									X
Sherrill, Harry	The FWA Group	X	X	X	X				X				X	X
Shields, Bobbie	E&BS	X	X											
Sietman, Kim	Simpson Electric			X										
Smith, Allen	Freeman-White													
Sommers, Sheila	E&BS	X		X	X		X	X	X	X		X	X	X

Attendance Summary

[illegible]

Reports Proposed

Under the Legacy System

***(Subject to technical
feasibility and final cost.)***

CERTIFICATE OF OCCUPANCY STATUS

Permit # _____
Address: _____
Project Name: _____

Trade	Action	Hold Applied	Hold Released
Building	H(old)	01/21/01	
Electrical	A(pproved)	01/15/01	01/21/01
Mechanical			
Plumbing			
Fire Protection			
Zoning	TCO*	01/15/01	
CMUD			
Environmental Health			
CDOT			
City Engineering			
Other Agencies TBD			

By clicking on the "Hold" the user should get the person's name, e-mail and phone number who placed the hold, so that they have a direct line of communication to the person who placed the hold

Notes:

- This would be a table that would allow the contractor to view all holds on his project.
- Type in the project number or the address, the rest should prefill in.
- For B, E, M, and P, by clicking on H, it should take you to the Inspection Status screen.
- Use TCO in action column and click to get data status and reason.
- Customer only wants to see the disciplines that affect them.
- Customer wants to see only one line for each trade.
- *This would be implemented under the new permitting/inspection system, not under the Legacy system.

INSPECTION STATUS

Building, Plumbing,
Mechanical, Electrical, Fire
Protection, or Zoning

Permit Number: _____

Project Name: _____

Address: _____

Confirmation No.: _____

JOB HISTORY

<u>Confirmation Number</u>	<u>Pin #</u>	<u>Inspection Type</u>	<u>Date Requested</u>	<u>Date Performed</u>	<u>Result</u>	<u>Inspector Number</u>

This is a box that will show "Failed Chargeable, Failed Not Chargeable or Pending." When the user clicks on the Failure, he should get the code defect text and any comments the inspector made.

When you click on the inspector's number, you get his/her name and a mobile telephone number

By clicking on the confirmation number, the user should get specific information about the particular inspection

Notes:

- This screen should allow the user to find the inspection status by permit number or by address, or confirmation number, whichever the user prefers.
- All boxes should be clickable to offer the user another level of expanded information.
- If the user clicks on address, he should get a complete job history.
- Under "Permit Number": if the user uses the master permit number, he should get all the inspections related to that project; likewise, if he uses the sub permit number, he should get only the information related to that permit.
- *Pin numbers are voluntary, allowing customers to break data down by PM/superintendent.

Proposed Reports to be Included
in the Plan Review Module

Plan Review Deficiency Report

Building Review:

Issue	Code Section	Number of Defects	% of total
<i>Accessibility Requirements</i>	<i>Vol. 1-C</i>	92	36%
<i>Doors</i>	<i>1012</i>	12	5%
<i>Ramps</i>	<i>1013</i>	12	5%
<i>Porch</i>	<i>1014</i>	13	5%
<i>Guardrail</i>	<i>1015</i>	11	4%
<i>Interior Wall Construction</i>	<i>Table 704</i>	40	16%
<i>Egress widths</i>	<i>Table 1004</i>	38	15%
<i>Architect/Engineer Seals</i>	<i>GS 83-14</i>	37	15%
Total All Defects		255	

PLAN REVIEW PROJECT SUMMARY

Project No.: _____
 Project Name: _____
 Date Submitted: _____
 Date Entered Into System: _____
 Preliminary Review? Yes _____ No _____

By clicking on
status, user
should get the
reviewer's
comments

By clicking on
assigned reviewer,
user should get his e-
mail address and
phone number

1st Review

	Status	Days in System	Reviewer Assigned	Review Complete	Review Picked Up
Building	Disapproved	12	P. Granson	01/15/01	
Electrical	Approved	5	J. Weathers	01/08/01	
Mechanical	Approved as Noted	11	T. Pace	01/14/01	
Plumbing					
Fire Protection					
Zoning					
City Engineering					
Urban Forestry					
Environmental Health					

2nd Review

	Status	Days in System	Reviewer Assigned	Review Complete	Review Picked Up
Building					
Electrical					
Mechanical					
Plumbing					
Fire Protection					
Zoning					
City Engineering					
Urban Forestry					
Environmental Health					

Notes:

- User should enter the Project Number – the data should prefill automatically.
- The table should only list the affecting disciplines
- The user should be able to print the comments of all trades without having to click to get each trades' comments individually.

CHARLOTTE-MECKLENBURG BUILDING STANDARDS
BUILDING PLAN REVIEW SHEET

Project Number: _____ Date: _____

Project Name: _____

Plan Reviewer: Patrick Granson



By clicking on the reviewer's name, user should get his e-mail and phone number

Review Number: _____ Received: _____ Completed: _____

Sheet No.	Issue	Code Section	Addressed or Corrected?	Change And Location
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

Plan reviewer's comments go here

By clicking on the code section referenced, A/E should get a summary of the code

A/E will note the change and the location for the reviewer

A/E will check the box when item is complete; Gatekeeper will ensure all items have been addressed before allowing plans to come back into the system.

Proposed Reports to be Included

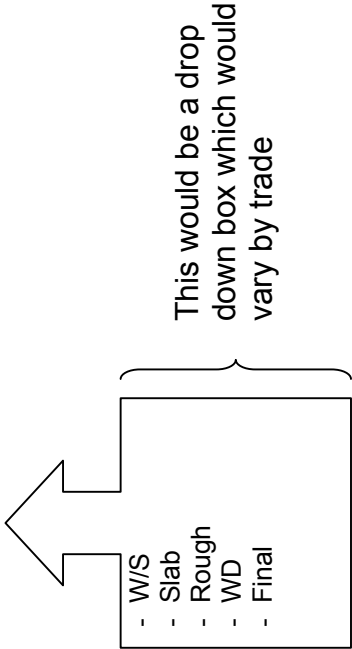
in the New

Permitting/Inspection Module

INSPECTION SCHEDULING

Account # _____

Permit Number	Address	GC/Builder Name	Inspection Type	Pin Number*	Requested Inspection Date	Requested By	Confirmation Number



Notes:

- This would be a table that would allow the contractor to schedule multiple inspections at one time
- The Requester would tab and fill in the permit number
- The address and Builder Name should come up automatically
- The inspection type should be a drop down box
- The requester keys the pin number, requested inspection date, and requested by
- The requester then tabs to the next line
- Once complete the requester should hit a "SUBMIT" button, which would assign the confirmation number and provide a report to the requester.
- *Pin numbers are voluntary, allowing customers to break data down by PM/superintendent.

INSPECTION STATUS BY CONTRACTOR ACCOUNT

Account # _____
Active Inspections

Address	Permit Number	Confirmation Number	Pin Number*	Inspection Type	Date Requested	Status	Inspector Number

Passed inspections will drop off any previous failed inspections under the permit number

This should be a linkable box that when you click on the Inspector's number, you get his/her name and a mobile telephone number

This is a box that will show "Failed Chargeable, Failed Not chargeable or Pending." When the user clicks on the Failure, he should get the code defect text and any comments the inspector made.

Notes:

- This would be a table that would allow the contractor to view all active inspections.
- The contractor keys his account number and the rest of the page fills in automatically.
- The project should stay on the system until the CO is issued.
- The contractor should be able to click on the column title and sort data by that field name.
- *Pin numbers are voluntary, allowing customers to break data down by PM/superintendent.

Memo

Date: March 9, 2001

To: Jim Bartl, Director of Code Enforcement

From: Dick Pacetti, Assistant Director - Technology

Re: Timeline for Data Customer Focus Group Final Report Items

The issues and reports in this document fall into three categories:

- A. Items that can be accomplished with the current legacy system, depending on value to the customer and cost
- B. Items that can be accomplished through the Plan Review sub-project now in progress
- C. Items that must be deferred until the Permitting and Inspections sub-project replaces the legacy system

A. Legacy Data

- Inspection Status Report
 - Delivery: Not evaluated as of 3/9/01
- Certificate of Occupancy Status
 - Delivery: 4-6 weeks after approval to begin work; will impact Plan Review sub-project work

B. Plan Review sub-project

- Plan Review Project Summary
- Building Plan Review Sheet
- Plan Review Deficiency Report
 - Delivery: Production date of LAN-based system awaiting completion of technical design (March 2001); Web enablement to follow

C. New Permitting and Inspection sub-project

- Inspection Scheduling by Account Number
- Inspection Status by Account Number
 - Delivery: No schedule available, will follow Plan Review, and may be purchased system

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